



MEMORANDUM

Date: January 7, 2021

To: The Honorable Chair and Members
Pima County Board of Supervisors

From: C.H. Huckelberry
County Administrator

A handwritten signature in black ink, appearing to be "CHH", is written over the printed name "C.H. Huckelberry".

Re: **Access to Various County Data Bases**

The Analytics and Data Governance (ADG) Department collects, maintains, analyzes and disseminates data and that will allow you to easily and regularly review a variety of data including information provided daily by the Finance and Human Resources Departments.

Attached please find very simple instructions about how you and your staff can access the various Power BI reports that are available. While more extensive "How To's" are available on the ADG intranet site, ADG Director Ellen Moulton and her staff would be happy to meet with you to provide additional instruction. Ms. Moulton can be reached at 724-3138.

CHH/sp

Attachment

c: Jan Leshar, Chief Deputy County Administrator
Ellen Moulton, Director, Analytics and Data Governance Department

County-Wide Data Analysis

Analytics & Data Governance (ADG), in conjunction with Finance and Human Resources, created several analysis tools for County leadership to use in reviewing county-wide data. This is an ongoing effort to provide interactive reports, within Power BI. The data for these reports is pulled from ADP, for all HR and payroll data, and Planning & Budgeting (PB) for budget information. The data is always one-day old.

These reports can be found on the Pima County intranet site under Enterprise Applications → System Access → Analytics & Reporting or by using the link below.

<https://spbiapp.central.pima.gov/PimaInsights>

ADG has created a user manual and detailed job aids to assist users in learning the functionality available in Power BI. These are available on the ADG intranet site.

1. The following interactive reports are currently available under the **BUDGET** folder:

Adopted Budget provides access to historical, forecasted and current financial and position budget data, for the current fiscal year, 2021. The interactive report allows users to drill down into a departmental data to view it in more detail.

- The Adopted Budget – Details tab provides the adopted budget at the object level and includes any provided justification information.
- The Adopted Budget – Positions tab provides job and cost information for all positions included in the adopted budget.
- The Grants tab provides budget information for grants projects included in the adopted budget.
- The Departmental History Chart provides a graphical view of current and historical actuals, forecasts and adopted budgets.

Budget Creation provides access to historical, forecasted and current financial and position budget data for the current budgeting fiscal year, 2022. This document will update nightly as users enter information into PB. This interactive report includes the same tabs at the Adopted Budget report.

Budget Creation – Grants provides additional details for Major Programs and individual grant activities for the current fiscal year and the proposed budget year.

Department Overview provides a view to current and historical budget narratives at both the department and program level.

All budget data is pulled from the Planning & Budgeting system and is always one-day old.

2. The following interactive reports are currently available under the **HUMAN RESOURCES** folder:

Employee Demographics provides access to current employee statistics by age, ethnicity, gender and department.

Position Listing provides access to current positions, both filled and vacant, in some level of detail.

- The Current Positions tab provides a listing of all positions by department, the number of employees in each position and if the position is vacant, how many days the position has been vacant. This information is displayed at the Unit level for each department.
- The Vacant Positions tab lists only those positions currently vacant, the number of days vacant as well as a flag to indicate if the position is currently being recruited for by HR.
- Since Grants are managed at the Major Program / Program level, a separate tab for Grants allows the user to view the information at this lower level.
- The Budgeted Cost tab takes the adopted budgeted position information from Planning & Budgeting. The budgeted costs are salary and benefits combined.
- The Summary tab provides a summary by departments of total positions, filled and vacant.

Job Classification provides on-line access to the pay grades, the job classifications, the job specifications and which departments are using each of the job classifications.

Furloughed Employees Over Time provides details on how many employees have been furloughed since the beginning of the pandemic. The data is provided in summary level for the County as a whole and by each department.

All employee related data is pulled from ADP and is always one-day old.

3. The following report is currently available under the **TIMEKEEPING DATA** folder:

Telecommuting provides access to which departments have employees telecommuting. This data is based on payroll data that is pulled from ADP. Consequently, this report is updated every two weeks on Wednesday, after the pay period has closed. The data is provided at a summary (department) and employee level. The data can also be limited to specific pay periods.

All timekeeping or payroll related data is pulled from ADP and is only pulled for closed pay periods.

User guides for all of these reports can be found on the Analytics & Data Governance intranet page or via the link below.

<https://intranet2.pima.gov/department-intranets/analytics-and-data-governance/pima-insights/>

Additionally, ADG staff is available to hold training sessions for staff either through a TEAMS meeting or in person. To schedule a training session, please contact Nellie Medina @ 4-INFO.